

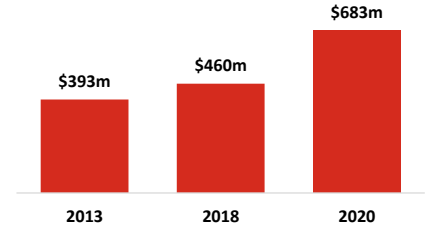
FLEURIEU PENINSULA

REGIONAL PROFILE



OVERVIEW

- Currently the Fleurieu Peninsula contributes \$460 million to the December 2018 South Australian expenditure of \$6.8 billion.
- The Fleurieu Peninsula has achieved 67 per cent of their \$683 million 2020 target.



Annual Visitor Summary December 2016 - December 2018

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	559,000	146,000	706,000	24,000	729,000
%	79%	21%	97%	3%	100%
Nights	1,442,000	667,000	2,109,000	259,000	2,368,000
%	68%	32%	89%	11%	100%
Average Length of Stay	3	5	3	11	3
Domestic Day Trips					2,609,000
International Day Trips*					94,000

PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	457,000	213,000	40,000	21,000	729,000
%	63%	29%	5%	3%	100%
Nights	1,379,000	758,000	138,000	93,000	2,368,000
%	58%	32%	6%	4%	100%
Average Length of Stay	3	4	3	4	3
Expenditure					
Average Annual Expenditure				\$	462,000,000

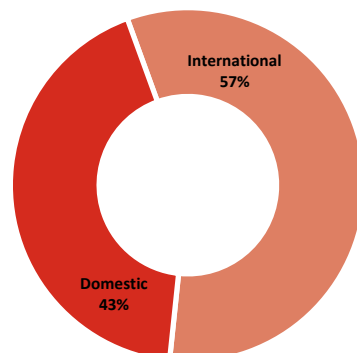
- 97 per cent of visitors are Domestic visitors and 3 per cent International visitors.
- Domestically, 79 per cent of visitors are from within the state compared to 21 per cent from Interstate.
- 92 per cent of visitors to the Fleurieu Peninsula are Leisure visitors (Holiday + VFR).
- On average 2.6 million day trips are taken to the Fleurieu Peninsula each year, with an extra 94,000 international day trips.

* International visitors counted as taking "International Day Trips" are also counted at the location of their overnight stay. Therefore, while they are visible as "feet on the ground" they cannot be added to the international visitor total for the region.

FLEURIEU PENINSULA TOURISM LISTINGS

Category	Fleurieu Peninsula
Accommodation	150
Food and Drink	58
Event	49
Attraction	45
Tour	18
Hire	4
General Services	3
Grand Total	327

FLEURIEU PENINSULA MEDIA COVERAGE



Note: some listings have multiple categories of accommodation
Source: Australian Tourism Data Warehouse

Source: Advertising Space Rate - 2018

FLEURIEU PENINSULA

REGIONAL PROFILE



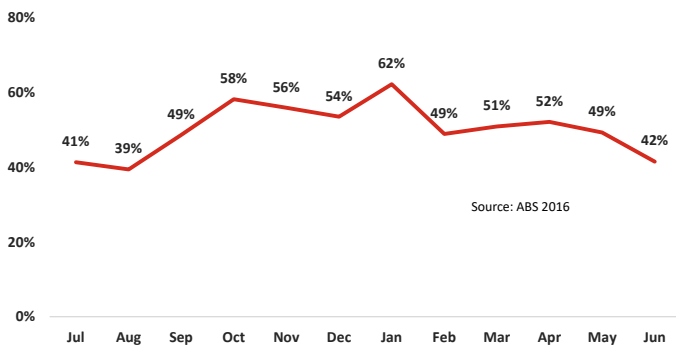
ACCOMMODATION SUPPLY

Hotels, Motels and Service Apartments with 15+ rooms

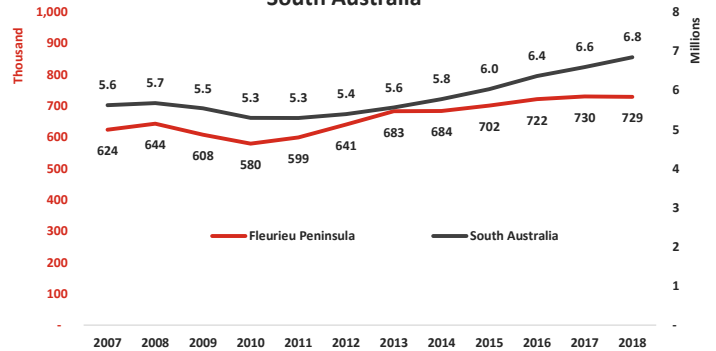
Establishments	16
Rooms	504
Occupancy	50%
Takings	\$11,900,000

- Average occupancy for the year is 50 per cent over 16 establishments and 504 rooms.
- The peak months are October and January with occupancy of 58 per cent and 62 per cent respectively.
- Low point of the year comes in August with occupancy on average dropping to 39 per cent.

Monthly Occupancy Rates Year end June 2016 - Fleurieu Peninsula

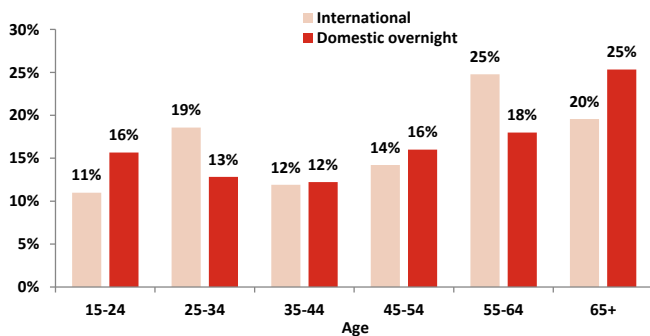


Total Overnight Visitation to Fleurieu Peninsula & South Australia

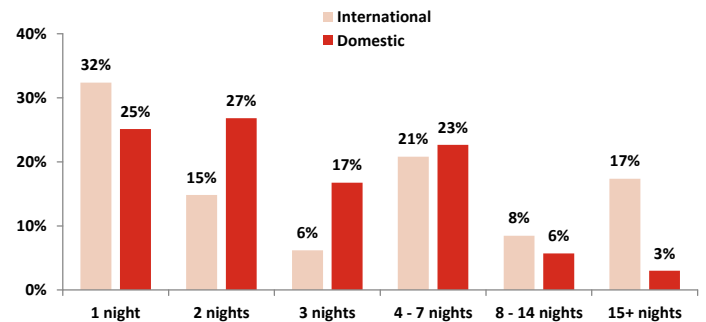


VISITOR PROFILE

Age of Visitors to Fleurieu Peninsula



Length of Visit to Fleurieu Peninsula



- International visitors peak in the 55-64 age group at 25 per cent.
- Domestic visitors to the Fleurieu Peninsula peak in the 65+ age group at 25 per cent.

- 32 per cent of International visitors prefer to stay 1 night on the Fleurieu Peninsula.
- 52 per cent of Domestic visitors prefer to stay 1 or 2 nights.

FLEURIEU PENINSULA

REGIONAL PROFILE



DOMESTIC VISITOR PROFILE

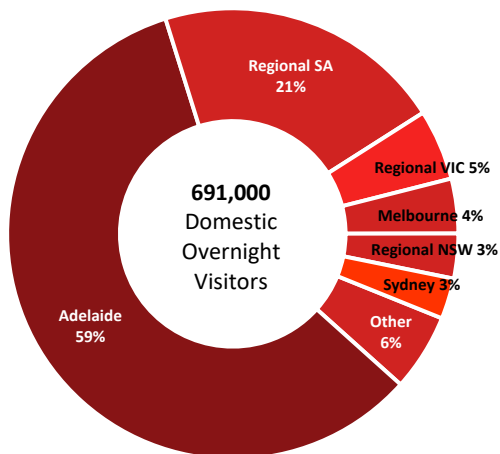
Purpose	Holiday	VFR	Other	Total
Visits	443,000	205,000	60,000	705,000
%	63%	29%	9%	100%
Nights	1,306,000	620,000	183,000	2,109,000
%	62%	29%	9%	100%
ALOS	3	3	3	3

INTERNATIONAL VISITOR PROFILE

Purpose	Holiday	VFR	Other	Total
Visits	15,000	8,000	np	24,000
%	63%	33%	np	100%
Nights	73,000	139,000	47,000	259,000
%	28%	54%	18%	100%
ALOS	5	17	np	11

VISITOR ORIGIN

Origin of Domestic Overnight Visitors to Fleurieu Peninsula



Origin of International Visitors to Fleurieu Peninsula



- Victoria, at 9 per cent and New South Wales at 6 per cent, are the Fleurieu Peninsula's biggest Interstate markets.
- Regional South Australia contributes 21 per cent of visitors to the Fleurieu Peninsula.
- Adelaide visitors contribute 59 per cent of the visitors to the Fleurieu Peninsula.
- Internationally, Europeans contribute 60 per cent of the visits to the Fleurieu Peninsula, with the United Kingdom contributing 25 per cent and Germany 10 per cent.
- 10 per cent of visitors to the Fleurieu Peninsula are from the USA.

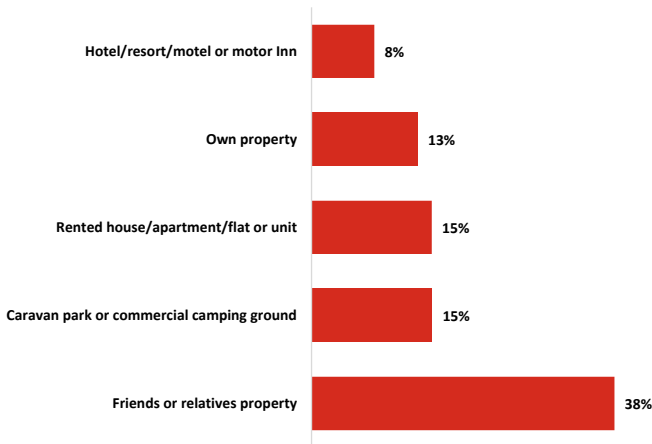
FLEURIEU PENINSULA

REGIONAL PROFILE

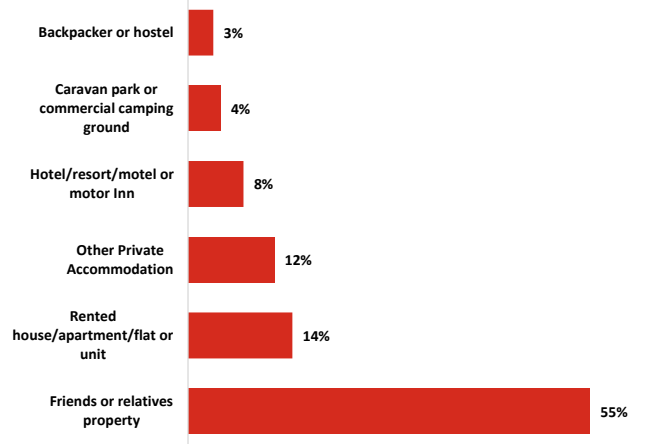


VISITOR USE OF ACCOMMODATION

Accommodation used in Fleurieu Peninsula for Domestic Visitors



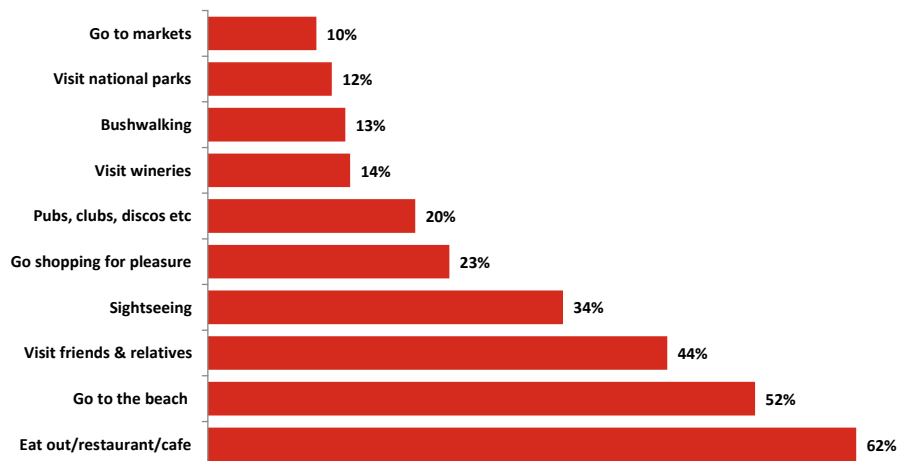
Accommodation used in Fleurieu Peninsula for International Visitors



- 53 per cent of Domestic visitor nights in the Fleurieu Peninsula are spent either with Friends or Relatives or in Hotels and similar accommodation.
- Domestically, Caravan and Camping is also popular with 15 per cent of visitors preferring this accommodation.
- 63 per cent of International visitors stay in Hotels and similar accommodation or with Friends or Relatives.
- 26 per cent of International visitors to the Fleurieu Peninsula stay in a rented apartment or private accommodation.

VISITOR ACTIVITIES

Domestic Visitor Activities in Fleurieu Peninsula



- The most popular activity when coming to the Fleurieu Peninsula is to Eat out or Dine at a restaurant and or cafe.
- Other popular activities include Going to the beach, Fishing, Visiting wineries and Going the markets.

FLEURIEU PENINSULA

REGIONAL PROFILE



REGIONAL TOURISM SATELLITE ACCOUNT INFORMATION

In 2016-17, the tourism industry contributed an estimated \$347 million to the Fleurieu Peninsula regional economy and directly employed approximately 3,100 people.

Employment

- 3,100 jobs for people employed directly by the tourism industry, 1,100 indirect jobs and a total employment impact of 4,200 people.

Tourism output

- \$319 million and \$350 million in direct and indirect tourism output, and \$669 million in total tourism output.

Gross Value Added (GVA)

- \$168 million and \$148 million in direct and indirect tourism GVA, and \$316 million in total tourism GVA.

Gross Regional Product (GRP)

- \$180 million and \$167 million in direct and indirect tourism GRP and \$347 million in total tourism GRP.

REGIONAL INSIGHTS

Interstate

- The variety is key to appeal with coast, food & wine, wildlife and a range of activities combining strongly.
- All in a package close to Adelaide.
- A good fit for a relaxing holiday.

Intrastate

- The best of South Australia, just down the road.
- Diversity of appeals the main drawcard for intrastate as well, well known and understood.
- Accessibility seals the deal.

International

- People like the proximity of the Fleurieu Peninsula to Adelaide.

Regional Visitor Strategy Priorities

- The key priorities for the Fleurieu Peninsula are to encourage year-round visitation and drive visitor yield.
- The aim is to grow spend from day-trippers as well as convert some day-trips into overnight stays.
- Levers for this include events, accommodation improvements, product development and marketing.

Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

Prepared by the South Australian Tourism Commission, December 2018

Sources Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2016 to December 2018.
Consumer Demand Product Testing Phase 1 - BDA Marketing

Notes and Abbreviations Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay
ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms. Cat. No. 86 35455001
Consumer Demand Product Testing Phase 1 - BDA Marketing

RED POLES, FLEURIEU PENINSULA

TOURISM CHAMPIONS CASE STUDY



ABOUT RED POLES

Red Poles opened in 2005 as a bed and breakfast, small café and art gallery. Today, Red Poles offers an art gallery, fully licensed restaurant, a bed and breakfast, weddings and private functions, art workshops and is the cellar door for Brick Kiln Wines and Vale Brewing craft beers.

The business also offers a variety of live performances, community events and school holiday programs.

BUSINESS GROWTH

In the last four years Red Poles has seen enormous growth.

In 2005, Red Poles employed two people, in 2017 the business employs a regular staff every week of 15.

Currently, the art gallery at Red Poles now exhibits up to 500 artists a year compared to 50 artists in the early years of the business.

CHALLENGES

A challenge faced by Red Poles is maintaining consistency and quality of what's on offer as the business continues to grow.

Recognising the changing face of tourism in the digital age was a challenge that Red Poles overcame by hiring a staff member to update the Red Poles website and create an online presence for the business across social media channels.

THE FUTURE

Into the future, Red Poles is focussed on becoming the best destination for food, wine, ale and art in the Fleurieu Peninsula.

2017 will see the introduction of an Indigenous Art Hub at Red Poles that will feature Indigenous art exhibitions and workshops with Indigenous artists. This project is believed to be the first for the Fleurieu Peninsula.

COMMUNITY IMPACT

Majority of staff at Red Poles live locally in the Fleurieu Peninsula region.

As an art gallery and live performance venue, Red Poles gives local artists and performers an opportunity to showcase their work to diverse audiences.

Workshops, school holiday programs and community events encourage local participation, bringing the community together.

Red Poles works with local tour operators on a regular basis and tries to use local produce wherever possible in the restaurant.

"The Fleurieu Peninsula is a fantastic region for local produce and I think it's really important for us to focus on that local produce wherever we can.

"The thing that drives me every day is my passion for where I work and that I get to focus on the things I love most – family, food, wine and art – they are all part of Red Poles. That will drive me forwards for hopefully many more years to come."

Ros Miller, Owner, Red Poles

SOUTH AUSTRALIAN TOURISM COMMISSION COLLABORATION

The SATC provided support through the Touring Routes project – including Red Poles on the Epicurean Way touring route.

Red Poles also receives many journalists and trade members each year as part of the SATC's familiarisation program.

CONTACT US
TOURISM.SA.GOV.AU

